Oil And Gas Separation Market Analysis By Technology (Gravitational, centrifugal), By Product (Two-Phase Separator, Three-Phase Separator, Scrubber), By Application (Onshore, Offshore & Refinery) And Segment Forecasts To 2020

Description: Global oil & gas separation market is expected to reach USD 10.68 billion by 2020. Favorable initiatives such as Kuwait conventions and U.S. EPA regulations towards maintaining optimum pipeline fluid quality with low gas to water and oil to gas ratio are expected to drive global oil & gas separation market. Increasing environmental concerns along with strict quality specifications are also expected to have a positive influence on the market growth. Key market participants have been investing heavily in R&D for technological developments to meet pipeline specific fluid quality. Rising E&P in conventional & unconventional reservoirs in offshore & onshore locations along with increased levels of water production in tight reserves is also expected to impact the market growth. Growing solid handling issues in existing plants along with high cost of equipment upgradation is expected to remain a key challenge for market participants.

Gravitational separation emerged as the leading oil & gas separation technology and accounted for over 45% of total market revenue in 2013. Gravitation is the most conventional method used for oil & gas separation and its existing capacities coupled with its effective separation have contributed to its growth in the past. The segment is expected to lose some of its share to other high growth segments such as centrifugal separation owing to increasing R&D and technological advancements to handle multiple fluid phases and various crude oil grades. Centrifugal technology is estimated to witness the fastest growth at a CAGR of 4.7% from 2014 to 2020 owing to more efficient separation mechanism.

Further key findings from the study suggest:

Three-phase separators were the largest product segment and accounted for over 40% of total market revenue in 2013. It is also expected to witness the highest growth of 4.9% over the next six years owing to their ability to deal with solids. Scrubbers are also estimated to witness significant growth over the forecast period on account of efficient mist separation coupled with increasing environment regulations for maximum particulate and GHG content in flare gases.

Onshore was the largest application segment and accounted for 59.6% of total market revenue in 2013. Oil & gas separation demand in offshore is expected to witness the highest growth rate of 5.4% from 2014 to 2020. Increasing deep sea and ultra deep sea investments in the “Golden Triangle” is expected to drive this segment over the forecast period.

North America was the largest regional oil & gas separation market and accounted for over 40% of total market revenue in 2013. The regional market is expected to witness significant growth on account of large number of shale plays in the U.S. Asia Pacific is expected to witness the highest growth rate of 5.1% over the next six years on account of improving oil & gas infrastructure coupled with rapid development of shale gas E&P. Increasing offshore oil & gas development in countries such as Malaysia, Indonesia and Vietnam is also expected to fuel the regional market.

Major companies in global market have been investing heavily on R&D for efficient oil & gas separation technology development. Key players operating in global oil & gas separation market include Opus Company, Pall Corporation, Unidro SpA, Hamworthy, Twister BV, Honeywell, Frames Group, Sulzer and FMC Technologies, Alfa Laval, Andritz and Westfalia.

For the purpose of this study, the report has segmented the oil & gas separation market on the basis of technology, product, application and region:

Global Oil & Gas Separation Technology Outlook (Revenue, USD Million, 2012 - 2020)
- Gravitational
- Centrifugal
- Others

Global Oil & Gas Separation Product Outlook (Revenue, USD Million, 2012 - 2020)
- Two-phase separators
- Three-phase separators
- Scrubber
- Others
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